

COURSE OUTLINE

Year: **2006/2007**

LEVEL: III, **TERM 2**

NAME OF THE SUBJECT: Investment Analysis & Strategy

NO. CREDITS: 6

NAME OF THE TEACHER: Derek Fisher

SHORT CV OF THE TEACHER: ... President, Metropolitan Life Works, Barcelona, Spain

Senior Vice President, Institutional Services, Zacks Investment Management, Chicago, IL USA

Financial Advisor, UBS PaineWebber, Palm Beach, FL USA

Financial Advisor, Gruntal Securities, New York, NY USA

SEMESTER 2

COURSE DESCRIPTION: This course will extensively examine the behaviour of stocks in the important global markets and how to best determine the fair market value of the issues and why stocks move up and down

COURSE OBJECTIVE

At the end of this course, students will be expected to be able to competently create financial portfolios understanding the parameters of selection and confidently outperform their respective indexes .

COURSE STRUCTURE:

The course structure will closely mimic an investment policy committee of a mutual fund or an asset management company. Students will be required to run two portfolios, one of their own picks and one of the picks that they vote on every single week. Performance will be tracked and the grade given will come mostly from this performance. There will be three presentations that will also represent the remaining portion of the grade.

SYLLABUS

SEMESTER 2			
			CLASS SUBJECT
08 Jan -12 Jan	Teaching Week 1	Wk 1	UK FTSE 100
15 Jan -19 Jan	Teaching Week 2	Wk 2	GERMANY DAX
22 Jan -26 Jan	Teaching Week 3	Wk 3	FRANCE CAC40
29 Jan -02 Feb	Teaching Week 4	Wk 4	JAPAN NIKKEI
05 Feb -09 Feb	Teaching Week 5	Wk 5	HONG KONG/CHINA HANG SENG
12 Feb -16 Feb	Teaching Week 6	Wk 6	KOREA KOSPII
19 Feb -23 Feb	Teaching Week 7	Wk 7	SCANDINAVIA
26 Feb -02 Mar	Teaching Week 8	Wk 9	BENELUX
05 Mar -09 Mar	Teaching Week 9	Wk 9	RUSSIA
12 Mar -16 Mar	Teaching Week 10	Wk 10	INDIA
19 Mar -23 Mar	Teaching Week 11 19 Mar Bank Holiday	Wk 11	BRAZIL
26 Mar -30 Mar	MIDTERM EXAMS	Wk 12	WEBS Contest
02 Apr -06 Apr	Easter vacation	Wk 13	
09 Apr - 13 Apr	Teaching Week 12	Wk 14	iShares
16 Apr - 20 Apr	Teaching Week 13	Wk 15	ETFs
23 Apr-27 Apr	Teaching Week 14	Wk 16	Mutual Funds
30 Apr-04 May	Teaching Week 15 30 Apr – 01 May	Wk 17	Beginning Option Strategies

	Bank Holiday		
07 May -11 May	Teaching Week 16	Wk 18	Collars and Spreads
14 May -18 May	Teaching Week 17	Wk 19	Other Derivatives
21 May -25 May	Teaching Week 18	Wk 20	Portfolio Reviews
28 May -31 May	EXAMS	Wk 21	Final Presentation
TOTAL HOURS			

STUDY CASES SEMESTER 1

Course text Books Recommended SEMESTER 2 same

STUDY CASES SEMESTER 2